Getting Started Guide for Managers

SiteScape Forum
SiteScape WebWorkZone

This manual describes the initial steps that Forum and WebWorkZone managers need to perform in order to set up SiteScape software.

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About this Manual

This chapter provides information about using this manual to learn about managing the SiteScape software.

For information about getting started with user features, please refer to the *User Guide* PDF.

In this Manual

This manual provides information about the following:

- Configuring SiteScape software so that your users can get started

  This manual explains how to set up your zone so that it is minimally configured to the specifications of your organization.

  WebWorkZone managers can find information about signing up for a zone in the Appendix.

- Understanding management levels

  You may choose to delegate management of workspaces and forums within your zone.

- Controlling access to online resources

  You can use SiteScape's powerful access-control tools to specify who is allowed to view information and perform various tasks in your zone.

- Creating additional workspaces

  Workspaces are virtual office spaces for subgroups within your organization. Everyone in your organization can access the zone workspace, and you can create additional workspaces as needed.

- Next steps

Conventions

This manual employs the following conventions:

What you see	What it means
Click the **Add** toolbar item. Click the **Getting Started** link. Click the **Add Document** menu item. Click the **Close** button.	References to toolbar items, links, menu items, and buttons are presented in **bold** font.
Type `status`, then press Enter. Open the `ManagerGuide.pdf` file.	Text that you must type and file names are presented in `Courier` font.
A *workspace* is...	A new term is presented in *italic* font when it is first defined.
See "Enable E-mail Notifications" on page 6.	Cross-reference hyperlinks are underlined (and blue, if you are viewing this document in color).

More Information

This manual presents getting started information for managers, but does not provide a complete reference. For information about more management commands:

1. Log in to Forum.
2. Click the **Help** toolbar item, located above the toolbar on the right side of the page.

   Help information appears in a separate browser window.
3. In the Help window, at the top of the left frame, click the **Show Help topics for managers** link.

   You can find introductory information in the "How do you..." and "More information about..." sections, located in the right frame, toward the bottom of the page. To view information about a specific task, click its title in the left frame.

In addition to reading the information provided in this manual, SiteScape invites you to visit the Help web site. Customers with maintenance contracts can also participate in SiteScape's support and customization forums. These forums provide a greater level of detail, collaborative exchanges with SiteScape engineers and with members of the support team, and the most up-to-date information available about SiteScape products and services.

For more information, visit the following URLs:

Forum Support: http://support.sitescape.com/forum/support/dispatch.cgi/support

WebWorkZone Support: http://support.sitescape.com/forum/support/dispatch.cgi/WebWorkZonesupport

Help: http://help.sitescape.com

Customization: http://support.sitescape.com/forum/support/dispatch.cgi/custom

Chapter 1: Configuring SiteScape Software

Before your users can begin using SiteScape software, you need to perform some initial configuration tasks.

In this Chapter

This chapter describes the steps necessary to set up SiteScape software so that a basic environment is available for use.

Task	*Description*
Log In As a Manager	After you log in to the zone-management account, you can perform all of the management tasks for the zone and the current workspace.
Set Access to the Zone Workspace	You need to decide who can view the zone workspace, which is the workspace accessible to all users in your organization.
Specify the Outgoing E-Mail Server	You must specify an outgoing e-mail server to be able to invite users to the zone, and to use features such as **I forgot my password**, e-mail notifications, and more.
Optional Configuration Choices	There are various optional features that you can enable or disable to change the zone appearance and functionality.
Enable E-mail Notifications	Users cannot receive e-mail notification of new or modified entries in a discussion forum until you enable this feature.
Invite Users to the Zone	After you provide the e-mail addresses of your users, the software sends users a link to pages that guide them through the registration process.
Facilitate Forum Use	SiteScape provides additional manuals to help you optimize the long-range use of Forum in your organization.

Log In As a Manager

You need to log in using a manager account in order to set up SiteScape software for your users.

To log in as a manager:

1. Enter this URL in the browser window:

   `http://yourcompany.com/ssf/zone1/dispatch.cgi`

   Note: *Replace portions of the URL above with values that you specified during installation.*

   The Login box appears.

2. In the "Login name" box, enter:

   `wf_admin`

3. In the Password box, enter the password you specified when you installed Forum.
4. Click the **Login** button.

   The zone-workspace page appears. You are now logged in.

In the upper-left corner of the page, a **SiteScape Forum** link appears. This is the name associated with the `wf_admin` account. When the name appears in the upper-left corner, you are logged into the system. (You can change **SiteScape Forum** to your own name by modifying your user profile.)

The zone manager belongs to the SSF Administrators group. In WebWorkZone, the group is called Administrators. The functions of the groups are the same. In this manual, "Administrators" refers to both groups.

By default, members of the Administrators group have the right to manage the zone. This means they can create new workspaces, create forums, add users, and so on.

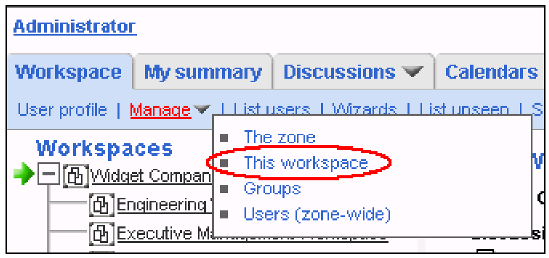
If you choose to give other users the right to perform zone-management tasks, you can add their usernames to the Administrators group.

Set Access to the Zone Workspace

One of your first tasks as a zone manager is to decide who can view and participate in the zone workspace. For example, using Forum, you may choose to prevent anonymous users from viewing any entries in the zone.

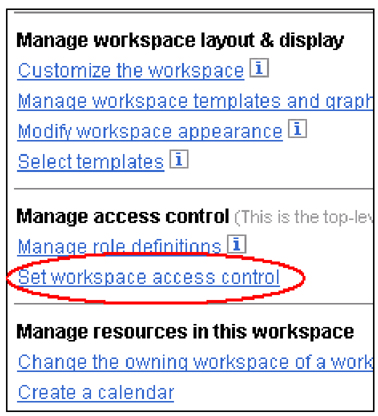
To change the default access to the zone workspace:

1. From the workspace page or the “My summary” page, click the **Manage** toolbar item and choose **This workspace**.



   A management menu appears.

2. In the “Manage access control” section of the menu, click **Set workspace access control**.



   The remaining instructions in this manual describe how to access management tools using a table such as the one below. This table summarizes the last two steps:

Manage > This workspace

Navigation:

Look for...	*Click...*
Manage access control	**Set workspace access control**

3. If the title of the page is “Control Access to...,” click the **manage by roles** link, located toward the top of the page. Otherwise, go to the next step.
4. In the Visitors column, click the “Anonymous users” checkbox.
5. Click **Remove selected groups from roles**.

   The “Role-based access control” page reappears. Anonymous users are no longer in the Visitors role, so they cannot view any pages in the zone.

   Upcoming steps in this section describe how to add instructional information to the zone-workspace page. For example, you may want to tell users to send e-mail to a manager before they can participate in the workspace.

   To return to the zone workspace, click the title at the top of the page.

Note: *The preceding is one of two methods provided for controlling access. See Chapter 3 for an overview of both methods.*

Specify the Outgoing E-Mail Server

You must specify information about the outgoing e-mail server in order to use these Forum features:

- I forgot my password (Forum e-mails you a new password)
- Invite users to the zone
- Send mail
- E-mail notifications from discussion forums
- E-mail notifications related to workflow processes
- E-mail notifications related to tasks and reminders

To specify the outgoing e-mail server:

Manage > The zone

Navigation:

Look for...	*Click...*
Manage e-mail settings	**Manage outgoing e-mail settings**

1. Navigate to this management page.
2. Specify the name of the machine that runs the outgoing SMTP e-mail server software.

   If you do not know the name, contact your system or network administrator. If the machine on which you installed Forum also runs an e-mail server, specify:

   ```
   localhost
   ```

3. Change the default port number if necessary.

   When you complete the form, Forum checks if the server and port information is valid. If it is not correct, contact your system or network administrator.

4. Enter a default “from” address for all e-mail notifications.

   This should be a valid e-mail address. If the SMTP e-mail server determines that it cannot deliver an e-mail message, it returns the message to this address.

   If Forum fails to contact the SMTP e-mail server after one day, an e-mail error log is created. (You can check for error logs from the zone-management menu.)

5. Click **OK**.

Optional Configuration Choices

There are additional, optional ways that you can configure your zone so that it reflects the values or working style of your organization. You may also want to add greetings or instructions to the pages, so that your zone is more inviting to users.

Consider using these management pages:

Select features for this zone (zone-management page)

Allows you to prevent anonymous users from accessing the zone or registering, disable chat rooms or messaging, prevent users from uploading files, and more.

Modify zone name, graphic, fonts, and colors (zone-management page)

Allows you to change the name of the zone, upload your company logo for display in the banner, set the color theme, and set the font size. For example, you might choose a larger font size for accessibility purposes.

Modify workspace appearance (workspace-management page)

Allows you to change the name of the current workspace, add different greetings for anonymous and registered users, and add text at the bottom of the workspace page.

You can use this page to provide text to orient your users to the zone-workspace page. For example, if you disable anonymous access to the zone, you may want to provide a greeting for anonymous users that includes the e-mail address of the person who can register them.

Set the message of the day (workspace toolbar)

Allows you to set a brief message for your users that expires after a specified period of time.

To further personalize your Forum installation to make it more inviting for new users:

- In the discussion forum, modify the folder abstract to include a welcome to users, a description of the purpose of the forum, and instructions for users about which links to click on. Then, add an introductory entry outlining the subjects to be discussed and perhaps some rules for the forum. Add another entry inviting users to “sign in” by adding replies to introduce themselves.
- Add some new usage tips to the User Tutorial forum, such as practical advice about using Forum to accomplish tasks specific to your organization.
- Create a chat session that new users can recognize as useful, such as a “Brainstorming Area” to prepare for a big meeting. Make sure that the name of the chat session clearly reflects its purpose (such as “Project Idea Lab”).

Enable E-mail Notifications

One of the most popular ways for users to track new and changed entries in a discussion forum is to have Forum send them e-mail notifications. E-mail notifications provide a summary of recent activities in the forum, along with links to the new or changed entries.

To allow users to receive notifications, you must configure the discussion forum to send them.

Tools > Administration

Navigation:

Look for...	*Click...*
E-mail operations	**Set e-mail notification schedule**

1. From the discussion forum, navigate to this management page.
2. In the “Set notification message content level” section, click the “Send titles only” or the “Send titles and summaries” radio button.

   If you choose “Send titles and summaries,” the e-mail message includes a few lines from the entry. You must specify the number of lines to be included. SiteScape recommends that you specify not more than 10 lines so as not to overload the server.
3. In the “Set the mail notification schedule” section, click the checkboxes of the days for Forum to send notifications.
4. In the same section, specify the times for Forum to send notifications. The times that you specify apply to each day that you selected. Use 24-hour format, and separate the hour value from the minute value using a colon (:).

   For example, this schedule sends notifications every hour and a half during a “nine-to-five” working day according to the time on the server:

   ```
   09:00   10:30   12:00   13:30   15:00   16:30
   ```

5. Leave the distribution list empty for now. Your users have not registered yet.

   After your users register, you can add them to the distribution list. Users can also enable their own notifications from the discussion forum by choosing **Set notification** from the **Tools** menu (for more information, refer to the *User Guide* or the online User Help System).

6. At the bottom of the form, click **OK**.

   The e-mail notification schedule is set for this forum.

Invite Users to the Zone

To invite users to the zone:

1. If your user profile does not include an e-mail address, you must add one so that users can reply to your invitations if they have questions.
2. From the workspace page or the “My summary” page, click the **Wizards** toolbar item.
3. On the wizard menu, click the **Invite users to join the zone** link.

   Note: *If this link does not appear on the Wizard menu and you are running Forum, you must specify your e-mail server (see* *page 4**).*

4. Optionally, you can change the default wording of the e-mail message.
5. Enter the e-mail addresses of the people you want to invite to the zone. Use one or both of the following methods:

   - Enter individual addresses in the “E-mail address” text boxes. To add boxes, click **More e-mail addresses**.

   - To add a list of e-mail addresses, copy and paste the list to the “You may also enter multiple e-mail addresses...” text box, then separate the addresses with commas.

6. Click **Next**.
7. Review the information on the Summary page, then click **Finish**.
8. Click **Close** to exit the Congratulations page.

Your users receive an e-mail invitation with the text you specified and a link to the Forum registration wizard. They use this wizard to provide a username, password, and additional information. After users register, they are logged in to Forum.

Facilitate Forum Use

Now that you have set up your zone, SiteScape recommends that you learn more about facilitating and optimizing the long-range use of Forum by reading the following PDF manuals:

- *Getting the Most Out of Online Collaboration*

  This manual covers issues that go beyond management and configuration, and describes techniques for building workspace hierarchies, creating an inviting collaborative space, assisting users in getting started, and generally optimizing the use of Forum.

- *Customizing Discussion Forums with Workflow Processes and New Commands*

  This tutorial teaches you how to customize entries in discussion forums so that they more closely resemble the work done in your organization.

To access these manuals, open the Help system and click **Getting Started Manuals**.

Chapter 2: Understanding Management Levels

When you begin managing Forum, there is only one management level: zone management. By default, the user who created the zone and the `wf_admin` user are the only members of the Administrators group. Members of this group have the right to perform zone-management tasks. If you choose, you can add other members to this group, so that they can help manage the zone.

Although it is possible have members of the Administrators group manage everything, this strategy becomes problematic as you create more workspaces and forums. At that point, it is helpful to delegate workspace management and the management of individual resources.

The Forum management levels and the default tasks that managers at those levels may perform are:

- Site Managers

  Primarily responsible for working with the SiteScape Forum software so that Forum runs smoothly. Tasks include updating the installation on the server, troubleshooting the internal processes of Forum, enabling e-mail for the system, and so on.

  Because site managers work directly with the server machine, there is no management menu specifically designed for them. Usually, site managers are also zone managers.

- Zone Managers

  Primarily responsible for performing the initial setup of the zone (the tasks described in Chapter 1), managing users and groups, creating workspaces, delegating management, customizing the zone using templates, and assisting the discussion-forum managers with the creation of initial custom commands and workflow processes.

- Workspace Managers

  Responsible for creating and deleting forums in a workspace, determining which forums appear in the workspace, viewing auditing information about the workspace, customizing the workspace using templates, and creating or deleting additional workspaces. (SiteScape recommends that you read Chapter 4 before allowing workspace managers to create additional workspaces.)

- Forum Managers

  Responsible for managing a single forum. The responsibilities vary according to the type of forum being managed (discussion, calendar, chat room, meetings, or tasks). Forum managers can modify access controls for the forum and allow or prevent viewing, participation, and other actions.

Managing a discussion forum requires more effort than managing other kinds of forums. These managers are responsible for auditing activity, deleting or moving entries, defining global keywords for users, managing the schedule for e-mail notifications, defining new commands and workflow processes, adding or removing columns in the list of entries, customizing the forum using templates, running reports about content in the discussion forum, and managing the e-mail posting of forum entries.

Additional information about delegating management is available in the online Manager Help system, in the **Workspace Organization** section.

Chapter 3: Controlling Access

SiteScape software provides two methods for controlling access to the zone, workspaces, discussion forums, chat rooms, and calendars.

The most effective method is called *role-based access control.* Role-based access control associates groups with a set of access rights. For new Forum users who have Version 7.0 or higher, this is the default method of access control.

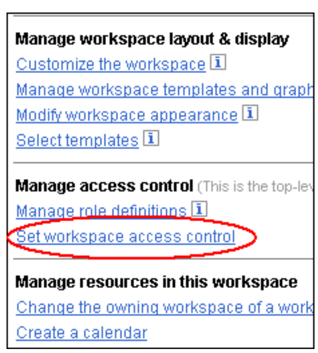
SiteScape's legacy method for controlling access is called *managing by rights*. This method allows you to map individual rights directly to one or more groups.

The sections that follow provide information about each type of access-control method and definitions for the default set of users and groups. More detailed information is available in the **Access Control** topic in the Manager Help.

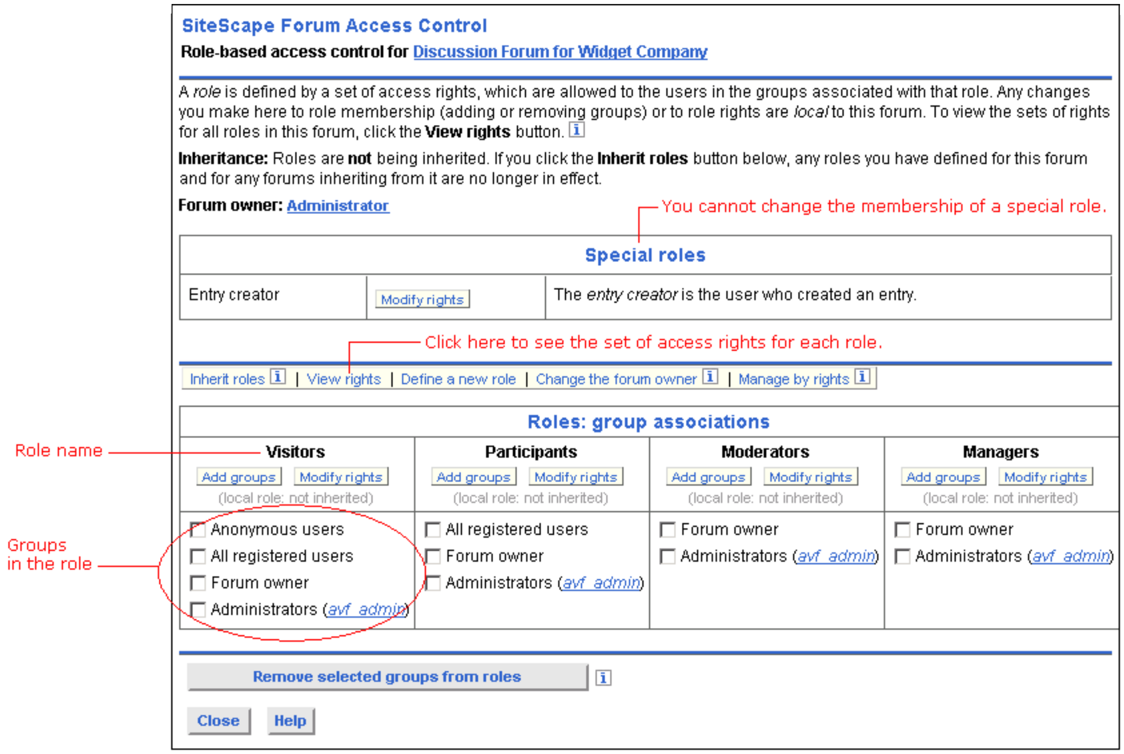
Role-Based Access Control

Role-based access control associates groups with a set of related tasks; together, this set of tasks defines a role. Each role gives the users in the associated groups permission (or rights) to perform each of the tasks in the set. Role-based access control simplifies and speeds access control, because it allows you to assign a broad, general level of access without requiring you to apply every right individually.

To use role-based access control, click the access-control link on the management pages for discussions, chat rooms, calendars, and workspaces. For example, on the discussion-forum management menu, click this link:



The discussion-level “Role-based access control” page appears.



These are the default access roles, with their default rights:

- Visitors (read only)

  Can view information in the resource (forum, workspace, calendar, and so on), but cannot add information or use other tools that are reserved for higher-level roles.

- Participants (write)

  Can view information, add information (such as a topic or reply in a discussion forum), and send e-mail to another registered user.

- Moderators (manage, modify, and delete)

  Can view, modify, or delete all entries, add information, send e-mail to another registered user, and create team workspaces.

- Managers (manage, modify, and delete)

  Can perform management tasks for the resource, such as using the management menu, controlling access to the resource, creating additional resources such as workspaces, and using advanced tools (such as the tool to send e-mail to all registered users).

Note: *The special role of “Entry creator” is reserved for the person who creates an entry. You cannot add groups to this role.*

Each type of resource has a default set of rights for each role. For example, in a zone, Participants can view forums, send e-mail to registered users, and more; in a discussion forum, Participants can add entries and reply to entries.

These are the default role rights in a discussion forum.

Rights	Roles				
	Visitors Modify rights	Participants Modify rights	Moderators Modify rights (local role: not inherited)	Managers Modify rights	Entry creator Modify rights
Read Folders and Entries	✓	✓	✓	✓	
Create Entries		✓	✓	✓	
Add Attachments		✓	✓	✓	✓
Add Replies		✓	✓	✓	
Modify Entries		✓	✓	✓	✓
Delete Entries		✓	✓	✓	✓
Create Folders			✓	✓	
Modify Folders			✓	✓	
Delete Folders			✓	✓	
Administrative Tasks				✓	
Modify Access Control i				✓	
Send Mail i		✓	✓	✓	
Send Mail to All Registered Users i					
Allow Entries to be Imported			✓	✓	
Allow Chatting on Entries		✓	✓	✓	✓
Create entries via e-mail		✓	✓	✓	
Add replies via e-mail		✓	✓	✓	

You can change the set of rights allowed to each role (the *role definition*) locally, from within an individual resource, by clicking the **Modify rights** button, located in the header row of each column. For example, in a discussion forum, you may want to remove the right to send e-mail from the Participants role. Local changes to the role definition apply only to the current forum.

> ***Note:*** *It is also possible to modify role definitions for all forums of a certain type. For more information, view the* ***Access Control*** *topic in the Manager Help system, and click* ***Manage Role Definitions****.*

One of the most powerful features of role-based access control is the option to allow a resource to *inherit* membership (the groups in each role) from its parent workspace. By choosing to inherit role membership from the parent, a manager can set up access control for a workspace or forum with a single mouse click. Then, if the zone manager makes changes to the role memberships, the changes are applied automatically through the inheritance hierarchy. For example, if the zone manager removes “Joe” from a group associated with Participants and adds him to a group associated with Visitors, his rights change from “read and write” to “read only” through all inheriting workspaces and forums in the zone.

For more information about inheriting role membership, view the **Access Control** topic in the online Manager Help system.

Managing by Rights

Managing by rights is the older method for controlling access to resources. When you manage by rights, you work with an “Access Rights” table within an individual resource, such as a workspace or a forum. In the left-most column of the table, group names appear, one group in each row. (Some of the “groups” may be specially defined individual users.) The top row of each table displays the access rights available in that resource, one right in each column. At the intersection of each row and column is a checkbox. When you select or clear the checkbox, you allow or suspend that right for that group.

You access this table the same way that you access the “Role-based access control” page.


Control Access to: Discussion Forum for Widget Company

The current access settings are listed below.

Click here to manage by roles.
Restore the access settings to the factory defaults.
Add an existing group or create a group.

Click on a checkbox to change the access right for a group.

	Access Rights (Click on a column header to change access permissions for individual users or hosts.)											
User Groups (Click a row header to modify a group's membership.)	Read Folders and Entries	Create Entries	Add Attachments	Add Replies	Modify Entries	Delete Entries	Create Folders	Modify Folders	Delete Folders	Administrative Tasks	Modify Access Control	Send Mail	Send Mail to All Registered Users
Registered Users	☑	☑	☑	☑	☑	☑	☐	☐	☐	☐	☐	☑	☐
Forum Owner	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☐
Anonymous Users	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Entry Creator	☐	☐	☑	☐	☑	☑	☐	☐	☐	☐	☐	☐	☐
Administrators	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☐

Apply Close Help

This method of access control allows you to assign to users the same set of rights you can assign using role-based access control. However, you must use the checkboxes in the table to group similar rights manually. This method is more labor-intensive, and does not offer the inheritance feature.

You can manage any set of resources using this method of access control.

> **Note:** *If you upgrade to Version 7.0 from an earlier version, managing by rights is the default method. To use role-based access control, click the* **manage by roles** *link, located toward the top of the page shown in the previous picture.*

Default Users and Groups

Both methods of access control use a default set of users and groups:

- Registered Users

  Users who have a registered username.

- Forum Creator

  The user who created the forum. In this context, a “forum” could be a discussion forum, a specialized forum, a calendar, a workspace, or any of the built-in forums such as tasks, meetings, or messaging.

- Forum Owner

  Initially, this is the same person who created the forum. It is possible to assign a new forum owner. You cannot assign a group as the forum owner.

- Anonymous Users

  Users who are not logged in. These users share one account, whose username is Anonymous.

- Administrators

  Users who have the right to access the management menus in all resources in the zone. By default, the first members of the Administrators group are the `wf_admin` user and the user who created the zone.

- Entry Creator

  The user who created an entry. In this context, an “entry” could be an entry in a discussion forum, calendar, chat room, meetings forum, or task forum.

- Entry Owner

  The user who owns an entry. By default, this is the same person who created the entry, but a new owner can be assigned.

Chapter 4: Creating Additional Workspaces

As members of your organization learn to use Forum, they are likely to request that you create subgroups and provide spaces in which to do specialized or more private work. For example, the engineering department may request its own workspace. Or, a team may request its own discussion forum.

To create groups, access the “Create a group” wizard from the “Manage groups” menu.

When responding to requests for more space in Forum, use the following questions to assist in your decision-making process.

Is the group that is making the request a subset or superset of the registered users?

An example of a subset is the engineering department within the WidgetCo organization. An example of a superset is one group that contains both WidgetCo employees and their customers (such as a customer support center).

If the group is a superset of the registered users, you may need to create a zone. This is an entirely separate working space with its own set of users. You can find information about creating a zone in the **Zone Management** section of the Manager Help system.

If the group is a subset of the registered users, your decision-making process continues with the next questions.

Can the needs of the group be met within an existing discussion forum?

If the group is very small and the need can be met solely by the discussion forum, consider giving the group its own subfolder in the discussion forum. For example, a project team can have its own folder within an engineering discussion forum. To create a subfolder, choose **Add folder** from the **Add** menu in the forum.

If the need cannot be met within a pre-existing discussion forum, proceed to the next question.

How big is this group and how active are they using Forum? How many groups are asking for space?

If the group requesting the space is small or uses Forum infrequently, consider creating a few forums for the group. You can do this from the “Manage the workspace” menu. For example, you can create a discussion forum, a calendar, and a chat room, and then use the access-control pages in these forums to make them visible and accessible only to members of the group. When members of that group view the workspace page, they can see and access the group forums. When other registered users view the workspace page, they cannot see links for the group forums (so the page is not cluttered with resources that they cannot access).

If only a few groups ask for space, this solution works well. If many groups ask for space, it may be time to create additional workspaces and move the forums to those separate areas. To learn more about reorganizing parts of the hierarchy, access the **Workspace Organization** topic in the Manager Help system.

If a group is very large and likely to be very active, consider creating a new workspace for the group right away. You can do this from the “Manage the workspace” menu. For example, suppose that the WidgetCo company’s engineering department is large, has experience with online collaboration, and has ideas for multiple discussion forums. This is a situation that calls for the creation of a separate workspace for the department.

If you are a member of a small organization, you can create workspaces as needed without much prior planning. However, if you are a member of an enterprise (very large, possibly global) organization, SiteScape strongly recommends that you plan the workspace design carefully before you create your workspace hierarchy. Do *not* simply create a workspace for every subdivision in the organization. Mirroring the organizational chart in this way creates a complex-yet-empty structure that is intimidating, especially to new users. In addition, creating one or two hundred “peer” workspaces or forums can affect Forum performance.

Large working spaces that mirror organizational charts may not be what users need. For example, the engineering department may use Forum enough to warrant its own workspace, but the Sales department may be happy with a dedicated discussion forum in the zone workspace. It depends on the size of the group and the volume of the activity.

Remember that you lose nothing if you start small with a dedicated folder within a pre-existing discussion forum, and move to larger and larger spaces. Forum provides the zone manager with tools for moving entries and forums.

If you are an enterprise organization, SiteScape strongly recommends that you read the *Getting the Most Out of Online Collaboration* manual. This manual contains detailed information about planning a workspace hierarchy for a large organization.

Chapter 5: Next Steps

You can find more information in the online Manager Help system. To access the Help:

1. Click any **Help** button.

   Help appears in a separate window.
2. In the Help window, click the **Show Help topics for managers** link, located at the top of the left frame.

The Manager Help system contains information about the following topics:

- Using the zone and workspace management menus
- Managing users and groups
- Managing individual forums
- Using customization methods such as commands and workflow processes
- Architecture, system tuning, and troubleshooting information (Forum only)

In addition to the material in the online Help system, SiteScape highly recommends that you read the *Getting the Most Out of Online Collaboration* PDF manual. To access the manual, open the Help window, and in the upper-left corner of the left frame, click **Getting Started Manuals**.

Getting the Most Out of Online Collaboration presents topics that go beyond management and configuration, and describes ways to create an inviting collaborative space, set up your zone to best serve your users, populate your zone to assist users in getting started, and other tips for maximizing the use of the SiteScape software. In particular, enterprise-level customers should read the *Constructing a Workspace Hierarchy* chapter.

SiteScape software includes options that allow you to radically change both the look-and-feel and the functionality of the product. For example, using a combination of new commands, workflow processes, and templates, you can create an application that is completely different from existing applications (discussions, calendars, and so on). You can create applications dedicated to purchase-order approval, document review, customer support, defect reporting, or any task that is routinely performed in your organization.

A tutorial for building a customized forum using new commands and workflow processes is available in the PDF manual, *Customizing Discussion Forums with Workflow Processes and New Commands*. To access the manual, open the Manager Help window, and in the upper-left corner of the left frame, click **Workflow Manual**.

For more information about customization options, open the Manager Help window and read the **Introduction to Customizations** topic.

For additional assistance, SiteScape invites you to visit the Help web site. If you have a maintenance contract, you can also participate in SiteScape's support and customization forums. These forums provide a greater level of detail, collaborative exchanges with SiteScape engineers and with members of the support team, information about how other customers are using SiteScape software and how it can assist your organization, and the most up-to-date information available about SiteScape products and services.

For more information, visit the following URLs:

Forum Support: http://support.sitescape.com/forum/support/dispatch.cgi/support

WebWorkZone Support: http://support.sitescape.com/forum/support/dispatch.cgi/WebWorkZonesupport

Help: http://help.sitescape.com

Customization: http://support.sitescape.com/forum/support/dispatch.cgi/custom

Appendix: Signing up for WebWorkZone

When using the WebWorkZone hosted service, your first step is to sign up for a zone.

To sign up for a zone:

1. Contact sales@sitescape.com to sign up for WebWorkZone.

   You will receive a URL, username, and password. SiteScape recommends that you print this information for future reference.

2. Enter the URL in the browser window. The URL follows this format:

   `http://webworkzone.com/`*`zonename`*

   Note: *Replace* `zonename` *above with the value that you specified when you signed up for the zone.*

   The Login box appears.

3. Enter your username and password, then click **Login**. (You may want to bookmark the page so that you can access it quickly in the future.)

   If you forget your password, leave the text boxes blank and click the **I forgot my password** link. WebWorkZone then sends a new password to the e-mail address that you provided when you signed up.

Although WebWorkZone is immediately usable, SiteScape recommends that you refer to Chapter 1 to make sure that your zone is optimally configured and ready for your users. For example, you may want to change the access controls to require that registered users be added to a group before they can participate (by default, anonymous users cannot participate). In addition, you might want to change the zone name, colors, and greetings.

You can find more information about WebWorkZone at https://webworkzone.com.

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